

Louisiana Housing Corporation Online Application User Guide

Version 4.0

9/8/2015 3:30:00 PM

Version Control

Version	Date	Author	Description
1	1/30/2015	LHC	Preliminary
2	2/20/2015	LHC	Added FAQ Section
2.1	2/25/2015	LHC	Added Profile Information Section
2.2	3/6/2015	LHC	Added Additional Screenshots
2.3	3/13/2015	LHC	Updated LHC I/T email address
2.4	4/10/2015	LHC	Added Print Section
3.0	5/19/2015	LHC	Challenge Period
4.0	9/8/2015	LHC	New Application Process

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Section 1 Overview

The Louisiana Housing Corporation (LHC) has developed an Online Application System ("System") which shall be used by entities requesting funding for multi-family projects throughout the State of Louisiana, to apply for funds from the Corporation. The Online Application can be accessed from anywhere with an internet connection by browsing to the tax credit section of LHC's website, http://www.lhc.la.gov/page/low-income-housing-tax-credit.

Any entity wishing to request multi-family funds through the Corporation must register within the System prior to creating and submitting an application. Only one user account per applicant shall be allowed (see Section 3). A user account may create and/or submit applications for multiple projects (properties); however, duplicate open applications¹ for the same property address AND funding source shall not be allowed. All required data and supporting documentation must be complete within the application, and the application must be submitted through the System by the applicable deadline to be considered for funding.

By submitting an application, applicants agree to conduct a transaction with the LHC by electronic means. In addition, applicants agree to permit the LHC to transfer the electronic application to any ancillary service providers, including but not limited to underwriters and market analyst employed in the Qualified Allocation Plan (QAP) process.

An overview of the Online Application process is illustrated in the following diagram:



At minimum, applicants are recommended to use the following web browsers to complete the Online Application:

Operating System Requirements by Web Browser	Windows Requirements	Mac Requirements	Linux Requirements
Internet Explorer 10	Windows 7 Windows Server 2008	Not supported	Not supported
Google Chrome	Windows 7 Windows 8 Windows XP Windows Vista	Mac OS X 10.6 or later	Ubuntu 12.04+ Debian 7+ OpenSuSE 12.2+ Fedora Linux 17

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¹"Open application" means any application that has been created and/or submitted, but has not reached a final disposition (Final Approval, Application Denied, Project Not Selected), or any application in the Challenge/Appeal stage. Multiple applications may be submitted for the same address as long as the funding source is not same.

Operating System Requirements by Web Browser	Windows Requirements	Mac Requirements	Linux Requirements
Mozilla Firefox 34.0.5	Windows XP Windows Server 2003 Windows Vista Windows 7 Windows 8	Mac OS X 10.6 Mac OS X 10.7 Mac OS X 10.8 Mac OS X 10.9	GTK+2.18 or later GLib 2.22 or later Pango 1.14 or later X.Org 1.0 or later libstdc++4.3 or later
Safari 6.0	Not supported	Mac OS X 10.7.4 or later	Not supported
Opera 26	Windows XP or later	Mac OS X 10.7 or later	Ubuntu 14.04 or later

The Corporation recommends that applicants start early and save electronic application(s) intermittently to avoid the possibility of last minute network traffic failures and/or bottlenecks.

For technical questions regarding LHC's Online Application or for problems resetting your password, please contact LHC I/T at 225.763.8700 or lihtcwebinfo@lhc.la.gov. For questions regarding programmatic requirements, please contact the applicable program administrator as listed with LHC's website, www.LHC.la.gov.

Section 2 Terminology

This section describes the System Concept and User Roles associated with the Online Application.

2.1 System Concept

The following are basic concepts and functions within the system:

- 1. **Application Input Stage** The applicant must complete all required fields, provide required documentation, and submit the application before the application deadline.
 - a. **Application Not Submitted Stage** The application deadline has passed and the application is not submitted; applies to competitive applications only.
 - b. Application Submitted Stage Applications that have been submitted are assigned by LHC supervisors to the appropriate LHC staff. LHC supervisors also ensure that the Application Fee has been submitted.

2. Challenge Period Stages

- a. **Clarification Requested** Clarification has been requested from the applicant on specific areas within the application.
- b. **Clarification Received** The application has been submitted with the clarified information.

2.2 User Role

System functionality is limited based on the role assigned to the user. The LHC Online Application supports the following user role:

1. **Taxpayer** – This role is assigned to the legal entity that will own and operate a project and that will be identified on Form 8609 as the taxpayer. This role is identified as an external user.

Taxpayer Responsibilities

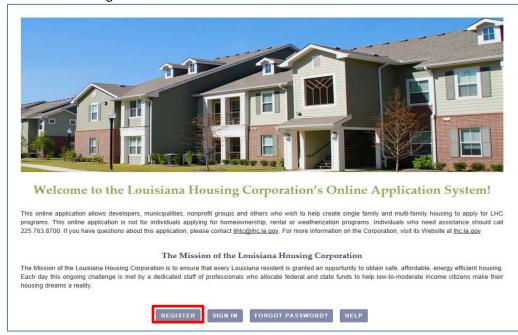
- Register within the Online Application
- Complete data fields
- Attach support documentation
- Complete acknowledgements and certifications
- Submit Application
- If "Clarification Requested", complete supplemental data entry and/or attach documentation

Section 3 Register

Any entity wishing to request multi-family funds through the Corporation must register within the System prior to creating and submitting an application. **Only one user account per Taxpayer Name, Legal Structure, Type, and email shall be allowed**. If a consultant is developing applications for multiple entities, the consultant will need to create a separate, unique account for each entity.

To register:

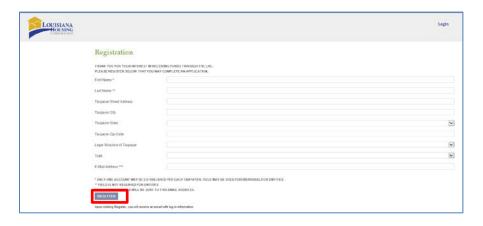
- 1. Browse to LHC Online Application
- 2. Click "Register"



- 3. Enter Taxpayer Name
 - a. Listed as First Name/Last Name
 - b. Entities/Organizations are only required to complete the First Name field
- 4. Enter Taxpayer Address
- 5. Enter Taxpayer City
- 6. Select Taxpayer State
- 7. Enter Taxpayer Zip Code
- 8. Select Legal Structure of Taxpayer
 - a. Corporation
 - b. General Partnership
 - c. Individual
 - d. Joint Venture
 - e. Limited Partnership
 - f. Local Government
 - g. Nonprofit Organization
 - h. Other (Note: If "Other" is selected, you must complete the "Other Description" field)
 - i. Other Description
- 9. Select the Taxpayer Type
 - a. Private For-Profit Organization
 - b. Not-for-Profit Organization
 - c. Not-for-Profit Organization/State-Certified CHDO
 - d. Public Housing Authority
 - e. Local Government
 - f. Native American Tribe
 - g. Other (Note: If "Other" is selected, you must complete the "Other Description" field)
 - i. Other Description
- 10. Enter Taxpayer Email Address

Note: All notifications will be sent to this email address. The same email address may not be used for more than one registration.

11. Click "Register". Once registered, you will receive an email with a system-generated username and password. Upon initial login, you will be prompted to change your password.



Section 4 System Navigation

The following sections provide set-by-step guidance for navigating through the Online Application after registering. Some functions may be performed throughout the Online Application.

4.1 Log In

To access your account, browse to LHC Online Application. Click "Sign In", enter your username and password, and click "Log In".



The system will prompt you to change your password the first time you log in.

4.2 Log Out

When you have finished working in the system, you should use the "Log Out" function located in top right corner of each screen to close out of the system. Using the "X" located in the top right corner of the browser window will close your browser window but will not log you out of the system. You should save any information entered prior to logging out.



4.3 Change Your Password

If you are logging in for the first time, you will be prompted to change your password. It is recommended that you immediately change your password to a private, personal password.

If you forget your password, browse to the online application and click "Forgot Password?".



Enter the email address associated with the account [the one used during registration] and click "Reset Password". You will receive an email with a system-generated password.

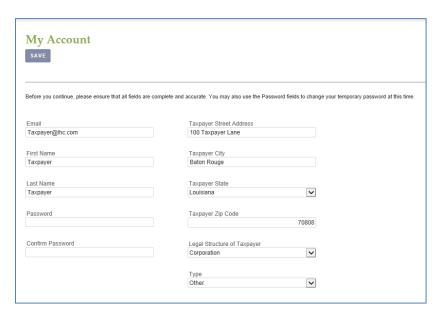


4.4 Profile Information

Once you have signed into the application, your username will appear in the top right corner.



Upon clicking your username, you will be directed to the Profile Information screen. The Profile Information is auto-populated with the information entered during registration.



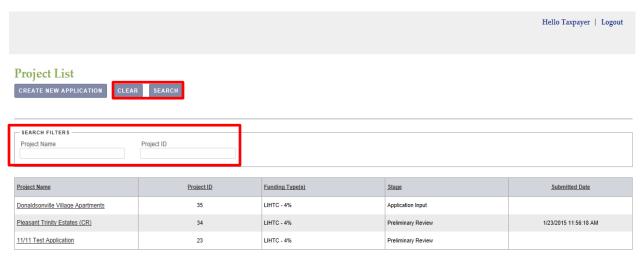
The system will allow you to edit the profile information and change your password. Upon completing all changes select "Save" to store the new information. The system confirms the updates by providing a saved time.



4.5 Dashboard

Every time that you log on following registration, you will be brought to your Dashboard. This Dashboard will show all applications created under the registered account along with other key information, such as the Project Name, Project ID, Funding Type, Stage, and the date the application was submitted.

Your Dashboard also contains a "Search Filters" section where you can search by Project Name and/or Project ID by entering the data in the appropriate field and clicking the "Search" button. To remove the data entered in the Project Name and/or Project ID field, click the "Clear" button.



The system will allow you to select and edit any applications within the "Application Input" or "Clarification Requested" stage from the display table.

You can return to your Dashboard at any time throughout the application process by clicking the "Louisiana Housing Corporation" icon or by clicking "My LHC" located in upper left of the your screen.



4.6 How to Proceed Forward and Backwards in the Application

The first screen viewable by you upon selecting an application from your Dashboard or upon clicking "Create New Application" from the Dashboard is the initial application entry screen. Clicking "Continue" [or "Begin Application" upon initial application creation] from this screen takes you to the Primary Input section. Each section thereafter displays "Forward" and "Backwards" buttons. To navigate forward to the next section/subsection, click "Forward"; to navigate to the previous section/subsection, click "Backwards". These options also appear at the top and bottom of each section/subsection.

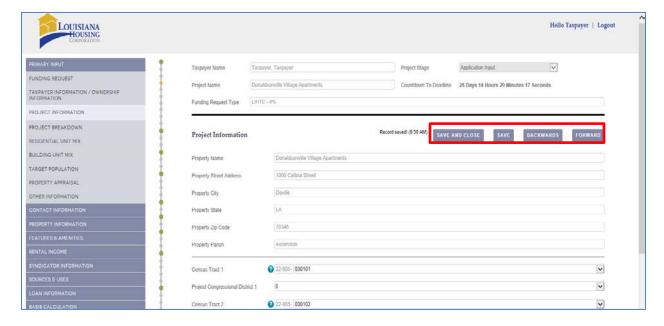


Note: It's not possible to navigate back to the initial application entry screen. You must first return to the dashboard and then reselect the application.

4.8 How to Save the Application

Application data are saved whenever a user moves forward or backwards through the application. Each screen within the application also includes "Save" and "Save and Close" buttons. By clicking the "Save" button during data entry, all data and attachments will be saved and the user will remain in the current section. Clicking "Save and Close" will save all data and attachments and return you to your Dashboard. The system also performs periodic auto-saves. The system records each time the application is saved.

Note: Some fields contain a "Calculate" button. Select this button to recalculate fields each time that new data is entered. The fields are also recalculated when the application is saved or you move forward or backwards in the application. If the acknowledgement box is already checked, it may be necessary to uncheck the box, recalculate or save to see the changes.

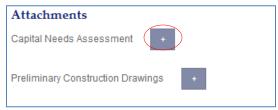


4.9 How to Add or Delete Documents in the Application

Supporting documents are required to be uploaded to the system and attached to specific screens throughout the application. The maximum file size per attachment cannot exceed 10 megabytes. The system will identify required attachments based on field entry. The system will allow attachments to be added or deleted at any time during the "Application Input", "Clarification Requested", or "Re-Processing" stages. Attachments can also be added or deleted from the Attachments section, which lists all required and uploaded attachments.

To Add an Attachment:

1. Click "+" upload a new document.



2. The "Upload a new file" dialog box will open.



- 3. Click the "Browse" button to browse and select the document you wish to attach.
- 4. Once you have selected the document you wish to attach, click "Upload".
- 5. The system uploads and names the document.



To Delete an Attachment:

1. Click "DELETE" next to the attachment name.

Note: The system also provides options for uploading additional/miscellaneous supporting documents in the Attachments section. Multiple attachments can be combined to create one document as long as the size does not exceed 10MB. The document should be named to identify the content.

4.10 How to Print the Application

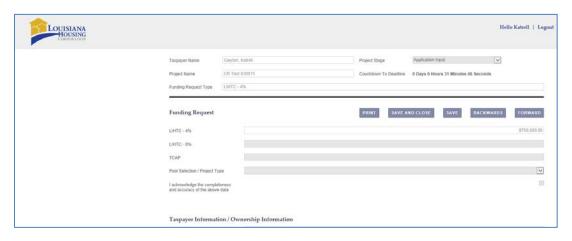
A "Print" button is displayed at the top of each screen in the application. You can select the "Print" button on any screen and the application will prepare to print.

Note: The entire application will print, regardless of the section you are in when you select "Print".

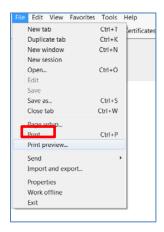


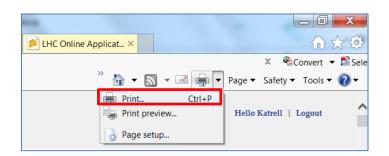
Once you have selected the "Print" button the application will prepare to print the application in its entirety.

Note: that the section headers do not appear on the left side of the screen.



To print the application select "Print" from your Web Browser Menu bar or the Command bar.





Once the application has printed select the "Louisiana Housing Corporation" icon or the "Save and Close" button to return to your Dashboard. Note that if you select the "Forward" or "Backwards" an error message will appear.

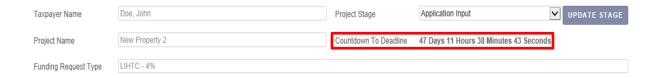
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Note: Any modifications made to the application in the print screen view will not be saved, you must return to the Dashboard and select the application from your Dashboard to edit the application.



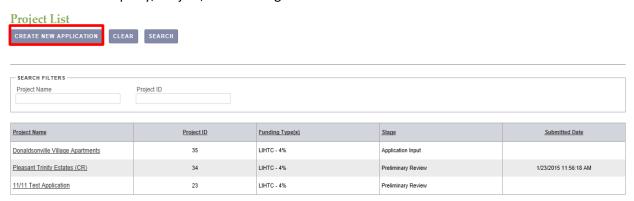
4.11 Clock Timer

A clock timer is displayed at the top of each screen in the application, counting down to the application deadline. Applications not submitted by the end of the deadline date will move to the "Application Not Submitted" stage and become inaccessible. The Taxpayer will be notified that the application was not submitted prior to the deadline.

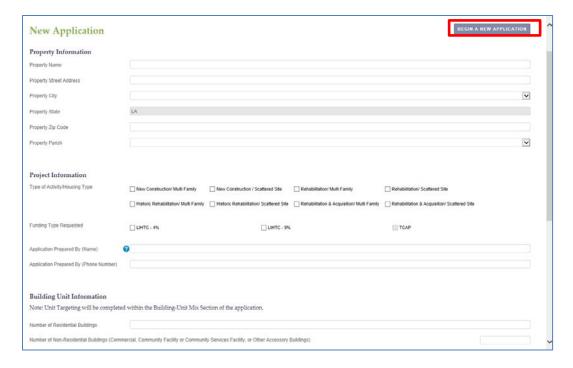


Section 5 How to Create a New Application

To start a new application, click "Create New Application" from your dashboard. You will be directed to a form to enter Property, Project, and Building Unit information.



Upon completing the required fields and uploading any required attachments, click "Begin a New Application" to create the application. The system will alert the user if any information or required uploads are missing if the acknowledgement box is checked. The system will also provide an alert if an active application already exists for the property address and funding type. If an active application exists, you will need to access that application from your dashboard.



Upon successfully beginning a new application, the system will generate a unique project ID and direct you to the Primary Input section. Additional sections and subsections will be available for completion. Any fields not associated with the Funding Type selected will be shaded in gray and non-editable.

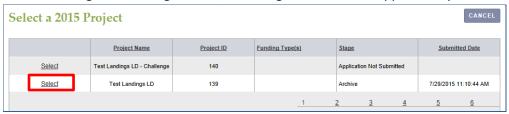
Section 6 How to Begin an Application from an Existing Application

If you have previously created an application in the System, you can use that application as a starting point for the next application. When you begin an application with an existing application, only the date entry will be carried forward. All attachments must be re-uploaded. You must also re-acknowledge each screen (see User Guide, Section 7).

1. Navigate to your Dashboard and select "Clone 2015 Application"



2. All applications created during the 2015 Funding Round will appear. Click "Select" next to the application you which to use to begin the current application period. Note that a new application was created during the Challenge Period, so be cognizant of which application you choose to select.



3. Select OK when prompted



4. The new application will appear on your dashboard with "Clone" at the end of the Project Name. Select the application by clicking the Project Name



5. All fields within the application can be edited by navigating throughout the application. Complete and submit the application as described within the User Guide. Taxpayer information must be updated in My Account by selecting your name in the top left corner.



Section 7 Completing an Application

The application consists of multiple sections and subsections. Each section and subsection is located in the left sidebar of the application. To select a subsection, select the section and then click on the specific subsection in the dropdown list.

Sections/Subsections:

- 1. Primary Input
 - a. Funding Request
 - b. Taxpayer / Information Ownership Information
 - c. Project Information
 - d. Project Breakdown
 - e. Residential Unit Mix
 - f. Building Unit Mix
 - g. Target Population
 - h. Property Appraisal
 - i. Other Information
- 2. Contact Information
 - a. Development Team
 - b. Jurisdiction Chief Executive Office Contact
- 3. Property Information
 - a. Property Demographics
 - b. Site Control Worksheet
 - c. Ownership History of Existing Buildings
- 4. Features & Amenities
 - a. Unit Amenities
 - b. Property Amenities
 - c. Property Features
- 5. Rental Income
 - a. Rental Income
- 6. Syndicator Information
 - a. Syndicator Information
- 7. Sources & Uses
 - a. Sources of Funding
 - b. Funds Uses

- 8. Loan Information
 - a. First Mortgage
 - b. Second Mortgage
 - c. Other Funding Questions
 - d. Reserve 20 Year Schedules
- 9. Basis Calculation
 - a. Basis Calculation
 - b. Building Information
 - c. Calculation of Intermediary Cost
- 10. Project Schedule
 - a. Project Schedule
- 11. Proforma
 - a. Proforma Calculation
 - b. Proforma
- 12. Experience/Past Performance
 - a. Development Team Experience
 - b. Project Team Disqualification
 - c. Property Management Experience
 - d. Nonprofit Information¹
 - e. CHDO Capacity and Experience
- 13. Feasibility/Viability
 - a. Underwriting
- 14. Selection Criteria
 - a. Selection Criteria
- 15. Attachments
 - a. Attachments
- 16. Identities of Interest/Certifications/Fees
 - a. Identities of
 - Interest/Certifications/Fees
- 17. Submission
 - a. Submission

A user may navigate and complete any of the application sections at any point. The system performs calculations, auto-populates certain fields, limits data input based on specific constraints and limitations, provides alerts if data entry does not meet eligibility thresholds, and requires waivers and/or specific attachments based on field entry or other system actions.

The system includes a checkbox within certain sections of the application for the Taxpayer to acknowledge the completeness and accuracy of data entry. This check box appears at the bottom of the

¹ "Nonprofit Information" subsection is only applicable if the type of organization registered is a "Not-for-Profit Organization" and "Not-for-Profit/State-Certified CHDO".

section/subsection above any required attachments. All attachments must be uploaded and all acknowledgments must be checked before application submission.



Note: The system does not check for incomplete fields or missing attachments within each section unless the acknowledgement box is checked or the Submit Application button is selected. This allows users to freely navigate throughout the application without requiring them to fully complete one section before proceeding to the next.

Section 8 Certify and Submit Application

Upon completing the primary application areas, the Taxpayer should review and complete the following sections:

- 1. Attachments
- 2. Certifications/Identities of Interest
- 3. Submission

All users will be required to execute and upload a certification statement prior to submission.

The Attachment tab shows any attachments uploaded and any outstanding attachments. All required attachments must be uploaded prior to submission.

To submit the application, select the Submission tab and click the "Submit Application" button. The system will provide an alert if any required fields, attachments, or acknowledgments are incomplete and will not allow submission until all required actions are taken. Once the application has been submitted, the stage will be updated to reflect the "Application Submitted" stage.



Section 9 Challenge Period

During the Challenge Period, the Taxpayer is requested to modify data entry and provide any evidentiary documentation requested to clarify specifics sections within the application. A clock timer is displayed at

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the top of each screen in the application, counting down to the Challenge Period expiration. The Taxpayer is required to complete specific actions in the application:

1. From your Dashboard, select the application titled "Challenge" in the Project Name to open the application you're ready to edit/modify in the "Clarification Required" stage.



2. Navigate to each screen to edit/modify data entry and attach evidentiary documentation as necessary for each screen requiring clarification.



Note: See the notes in the Detail Review section located at the bottom of the screen.



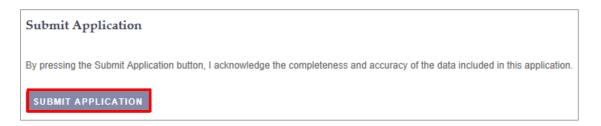
3. After you have completed editing/modifying data entry and attaching evidentiary documentation navigate to the Submission screen.



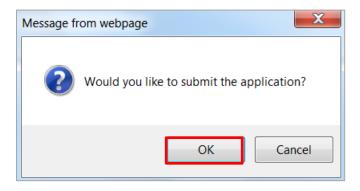
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4. Click "Submit Application" in the top left corner of the Submission screen.



5. Click "OK" when prompted.



After submission the challenge application will be sent to LHC for review and the stage will be updated to "Clarification Received".

Section 10 Notifications

At various stages throughout the workflow process, users may receive automated notification via email regarding the status of any application created by them or assigned to them. All emails will be directed to the inbox of the email address provided at registration.

Ref	Message	Stage	Recipient
1	You have successfully registered within LHC's Online Application System. You temporary password is Please log in within days to activate your account and begin an application. We look forward to working alongside you to develop safe, affordable, energy efficient housing for Louisiana residents. If you have any questions, feel free to contact LHC at 225.763.8700 or lihtcwebinfo@lhc.la.gov Please visit www.lhc.la.gov for up to date information regarding future funding opportunities.	Registration	Taxpayer
2	Dear [Taxpayer Name], This is to notify you that the application deadline for the [funding selection] has ended. Your application for [Project Name] was not submitted prior to the application deadline and will not be considered for funding at this time. If you have any questions, feel free to contact LHC at 225.763.8700 or lihtcwebinfo@lhc.la.gov Please visit www.lhc.la.gov for up to date information regarding future funding opportunities. We look forward to working alongside you to develop safe, affordable, energy efficient housing for Louisiana residents.	Application Not Submitted	Taxpayer
	Dear [Taxpayer Name],	Application Submitted	Taxpayer
3	This is to notify you that your [Funding Type Request] application for [Project Name] has been successfully submitted to LHC. You can log onto your account at XXXX to view the status of your application. Please visit www.lhc.la.gov for up to date information regarding future funding opportunities. We look forward to working alongside you to develop safe, affordable, energy efficient housing for Louisiana residents.	Clarification Received	Taxpayer

Section 11 Frequently Asked Questions (FAQs)

- 1. **Question:** It is possible to change the Taxpayer/Ownership information?
 - a. **Response:** Yes, the User Profile page allows users to change Taxpayer information. See *Section 4.4*.
- 2. Question: Does the application accept non-Louisiana cities?

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- a. **Response:** No, the dropdown selection within the application is limited to Louisiana cities. Only the Registration screen allows entry of cities outside of Louisiana.
- 3. Question: Is it possible to progress through the application without completing each page?
 - a. Response: Yes, it's possible to navigate through all application screens without completing each page as long as the Acknowledgement Statement box is not checked. See Section 5.
- 4. Question: Will the online application include Underwriting and Selection Criteria sections?
 - a. **Response:** Please see *Section 5* of the user guide for a complete list of sections and subsections included in the online application.
- 5. **Question:** Since the Registration screen asks for First Name and Last Name, how should a corporation name be entered?
 - a. **Response:** Registrants should enter the name of a corporation/entity in the First Name field and leave the Last Name field blank. *See Section 3*.
- 6. **Question:** Will the system provide a checklist for verifying attachments?
 - a. **Response:** An Attachments page is available that lists all required and uploaded attachments for each section of the application. Required attachments are also listed at the bottom of each application section/subsection. *See Section 4.9.*
- 7. Question: Is it possible to complete more than one registration using the same email address?
 - a. **Response:** No, the same email address may not be used for more than one registration. If a consultant is assisting more than one client, a separate email address is required for each client. It is possible, however, to create more than one application for each client. *See Section 3.*
- 8. **Question:** Is there a limit for entering longitude and latitude coordinates?
 - a. **Response:** Yes, the fields are limited to nine (9) digits, including special characters (ex. 30.458283).
- 9. **Question:** Where do we upload the attachments that are required for each section of the application?
 - a. Response: A list of required attachments is included within each section/subsection of the application. Some attachments are triggered based on completion of certain fields and other system actions. The system also includes options for uploading additional supplemental documentation on the Attachments page. See Section 4.9.
- 10. **Question:** How do you enter the scoring information?
 - a. Response: Scoring is determined based on application responses. Preliminary scoring is included in the Section Criteria section of the application. This section also includes a column for applicants to manually enter scores.